# User Guide

## Medicaid Eligibility Matching for Virginia School Divisions

## in the University of Massachusetts Medical School

## Online Matching System

**Updated June, 2017**

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**Questions**
Call UMass at 1-800-535-6741 or email RMTSHelp@umassmed.edu

# Matching School Division Student Roster to
# Medicaid Eligibility Data - Quarterly

This guide will describe how to upload a list/roster of your school division's students into the online web-based Medicaid Eligibility Matching system and complete the matching process. These steps are necessary so that school divisions can calculate an accurate Medicaid Eligibility Rate and provide accurate student counts/statistics for the quarterly Administrative Activity Claims. This process must be completed on a quarterly basis prior to submitting your Administrative Activity Claim data to UMMS. The matching system may also be used to match your December 1st Special Education Child Count file to determine the eligibility statistics to be reported in your annual Direct Medical Services Cost Report and for uploading your Billing Compliance Review (BCR) population file, which is a component of the annual Cost Report. *(Note: For more information on the details of how Eligibility Statistics are used in any of these areas of the Medicaid and Schools Program, please refer to the instruction guides for Administrative Claims or Cost Reports.)*

**Eligibility File Dates:**

| DMAS Eligibility Effective ("snapshot") Date | Fiscal Quarter | Results Used in (AAC / Cost Report) | School Division Students to be Included | School Division Student Enrollment Effective ("snaphot") Date |
|---|---|---|---|---|
| September 1 | Q1 (7/1-9/30) | 1st Quarter AAC | Division-wide total enrollment | September 1 |
| December 1 | Q2 (10/1-12/31) | 2nd Quarter AAC | Division-wide total enrollment | December 1 |
| December 1 | Q2 (10/1-12/31) | Annual Cost Report | Dec. 1 Special Education Child Count | December 1 |
| March 1 | Q3 (1/1-3/31) | 3rd Quarter AAC | Division-wide total enrollment | March 1 |
| June 1 | Q4 (4/1-6/30) | 4th Quarter AAC | Division-wide total enrollment | June 1 |

**Designating Personnel to Complete the Eligibility Match**

School Divisions must designate in writing (using the School Based Medicaid Program Division Contact Designee Information Form) who is authorized to upload your School Division's student roster into the Student Medicaid Eligibility Matching System. Additionally, someone must be authorized to review the student data within the matching system and make decisions about 'Possible Matches.' These designees can both be the same person, or the different functions can be separated between more than one individual. The designee form is included as an appendix to this instruction guide.

## Creating Upload Files

Prepare a list of the school division's students, aged 3 to 22 who meet the 'age of eligibility' requirements as described in the Virginia Administrative Code as of the 1st day of the 3rd month of the quarter, (3/1, 6/1, 9/1 and 12/1). The list of students must be put into Excel in the proper upload file format as shown below. All column headers/titles are mandatory, but not all fields are required to be populated with data.

**Column Headings/Titles:**

| | |
|---|---|
| A. Student Unique ID* | H. Address Line 1* |
| B. RID (Medicaid ID) | I. Address Line 2 |
| C. Last Name* | J. City* |
| D. First Name* | K. State* |
| E. Middle Name | L. Zip code* |
| F. Date of Birth* | M. SPED* (valid values = 'Y', 'N') |
| G. Gender* | N. Optional |
| | O. Parental Consent (valid values = 'Y', 'N')** |

\* Required data element
\*\* Parental Consent is only needed when uploading a BCR Population file

An example of a completed upload file appears below. Also, a copy of the upload template is included as an appendix to this instruction guide.

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Student Unique ID | RID | Last Name | First Name | Middle Name | Date of Birth | Gender | Address Line 1 | Address Line 2 | City | State | Zip code | SPED | Optional | Parental Consent |
| 2 | 123 | 123456789012 | APPLE | HOPE | ANN | 02/02/2011 | F | 22 LETTUCE LANE | | ANYTOWN | VA | 24482 | N | | Y |
| 3 | 125 | | ARTICHOKE | JESSICA | | 04/02/1999 | F | 404 PINEAPPLE PALACE | | ANYTOWN | VA | 24482 | N | | Y |
| 4 | 126 | | BANANA | SUSIE | B | 07/13/2001 | F | 100 MAIN STREET | | ANYTOWN | VA | 24482 | N | | Y |
| 5 | 127 | 123456789876 | CARROT | LUCY | L | 12/08/2005 | F | 31-A SPINACH COURT | | ANYTOWN | VA | 24482 | N | | Y |
| 6 | 128 | | DATE | DAVID | HARRY | 03/23/2006 | M | 2101 STRAWBERRY FIELD | APT. B | ANYTOWN | VA | 24482 | N | | Y |
| 7 | 129 | | ENDIVE | EMMA | D | 09/02/2008 | F | 119 CUCUMBER TERRACE | | ANYTOWN | VA | 24482 | N | | Y |

When saving the file so that it can be uploaded into the system, the naming convention is: *SMM_SDVA_Provider #_Qtr_Year_Version#*.xls.

**Example:** Q2 2015 file for ABC School Division (Provider# = 4980999):
**SMM_SDVA_4980999_2_2015_01.xls**

**Note:** In Excel, when saving your upload file, be sure to use the File / Save As option and change the file type to 'Excel 97-2003 Workbook (*.xls)' in the drop down list of choices in Excel.

File name: Book1.xlsx
Save as type: Excel Workbook (*.xlsx)
Authors:
Excel Workbook (*.xlsx)
Excel Macro-Enabled Workbook (*.xlsm)
Excel Binary Workbook (*.xlsb)
Excel 97-2003 Workbook (*.xls)
XML Data (*.xml)
Single File Web Page (*.mht;*.mhtml)

**Also note:** Excel will automatically save the file with the ".xls" extension on the end of the file name for you, so you will just type in the File Name field: SMM_SDVA_4980999_2_2015_01

**Uploading Files**

School Divisions will be able to begin uploading files for a given quarter after the State file from DMAS has been created and verified in the system. UMMS will notify all designated uploaders when the quarterly files are available for matching, but it should be available approximately 5-10 days after the effective date of the file.

To upload your school division student roster:

**Step 1:** Under "*Student Medicaid Eligibility*" on the left navigation menu, select "*Upload*."

**Step 2:** Choose the Year, Quarter and School Division for your file.

**Step 3**: Click "*Choose File*" to find your file. Click "*Open.*"

<div align="center">

| | |
|---:|:---|
| *Year : | 2017 ▾ |
| *Quarter : | 2 ▾ |
| *School Division : | Accomack County Public Schools ▾ |
| *File Path : | Choose File   SMM_SDVA_49...017_07.xls   Upload |

</div>

**Step 4:** Click "*Upload*." The file will show up on the list of files on the bottom section of the screen. The upload process takes a little bit of time, so you will need to click "Refresh" after a few minutes for the file status to change. *(Note: If you do not use the proper naming convention (see page 4) you will get an error message here.)*

The system will display this message indicating your file has been received and is being processed.

Your file has been queued for processing. The application will:
- Verify that data is in the proper format
- Upload the information
- Perform the automated matching process
The time needed to perform these steps will vary depending upon the size of your file and the number of other files that are in the queue.

**Step 5:** After the file is uploaded and there are no errors, the status of the file will change to "*Successful*." (from the upload screen) or "*Uploaded*" (from the review screen).

**If your file has errors**, you will need to click on the "*Error*" hyperlink to download a report which will identify the errors. Once you have corrected any errors with the upload file, delete the Error file by checking the box next to the file and clicking "*Delete*" Then upload a corrected file.

| Upload Date ▼ | Status | Record Count | Download | Uploaded By | ☐ |
|---|---|---|---|---|---|
| 01/12/2015 05:20:00 PM | Error | | | JessH1 | ☑ |

Delete

**Review the Results**

**Step 6:** From the left navigation menu; Navigate to the "*Review*" option.

**Step 7:** Select the Year, Quarter, and School Division for your file, then click "*Search*"

**Step 8:** Click "*Uploaded*" to review the results and continue processing.

|  |  |
|---|---|
| *Year : | 2017 ▾ |
| *Quarter : | 1  ▾ |
| *School District : | Buchanan County Public Schools ▾ |
| Upload Date : | ▾ |
|  | Search |

Delete

1

| School District | File Name | Year | Qtr | Upload Date ▼ | Status | Record Count | Download | Uploaded By | ☐ |
|---|---|---|---|---|---|---|---|---|---|
| Buchanan County Public Schools | SMM_SDVA_4981189_1_2017_99.XFR | 2017 | 1 | 05/04/2017 05:26:16 PM | Uploaded | 17 | 📊 | AudetteE | ☐ |

The automated matching process will compare all of the students on the school division's upload file to the DMAS statewide database of Medicaid, FAMIS and Medicaid Expansion recipients. Depending on the size of the upload file and the number of other school division files in the queue, this process could take up to a few hours. *(Note: You do not need to stay on the screen and wait for the process to complete. Once your file is in the queue, you may log out and come back later to view the results.)*

**Results of the Automated Matching process:**
The initial automated matching process will sort the students into 4 categories:

**Auto Matched:***       These students were an exact match to recipients in the DMAS eligibility file, based on last name, first name, DOB, gender and zip code.

**Auto Rejected:***       These students were not matches or even possible matches to any child in the DMAS eligibility file, no further review is needed.

**Duplicate Match:**       This status indicates that the same Medicaid recipient (from the DMAS eligibility file) is a possible match to multiple students included in your school division upload file.

**Possible Match:**       These students are close matches to one or more students in the DMAS eligibility file. Further review is required by the authorized designee. Details on how to review the file are below.

**\***To view these records you have to download the report. They are not available interactively.

## Reviewing Duplicate Matches

It is important to review any duplicate matches first, prior to moving on to review your possible matches. This ensures that you can make the determination about which one of your students is actually the correct match for the Medicaid recipient in the DMAS file, then the system can appropriately match the remaining students.

**Step 1:** Select the Matching Status of "*Duplicate*" from the drop-down and click '*Search.*' *(Note: if there are no duplicates, you can move on to reviewing Possible Matches)*

| | | | |
|---|---|---|---|
| **School District:** Augusta County Public Schools | | **Year:** 2017 | **Quarter:** 2 |
| **File Name:** SMM_SDVA_4979087_2_2017_07.XFR | | **Status:** Uploaded | |

Matching Status: Duplicates ▼  Last Reviewed By: ▼  First Name: [____]
RID: [____]  Last Name: [____]  Zip: [____]
Date Of Birth: [__] ▼  Gender: ▼
Student ID: [____]  🔍 Search

[ Review Complete ] [ Save ] [ Reset ] [ Close ]

| | Review Needed | RID | Last Name ▲ | First Name | Middle Name | DOB | Gender | Address Line 1 | Address Line 2 | City | State |
|---|---|---|---|---|---|---|---|---|---|---|---|

All sets of duplicate matches are shown together on the page. There could actually be two or more sets of records that the system has determined are close matches to more than one student in the School Division upload file. The students are shown in color highlighted pairs (or multiples) to allow for easy comparison of the school division information to the DMAS eligibility information. The student's information highlighted in **red** indicates data elements from the DMAS file that are different from the school division's record for the student.

**Step 2:** Review each page of duplicates and decide whether to manually '*Match*', '*Non-Match*' or mark for '*Review Needed*' by clicking the appropriate box in the left hand columns, then click '*Save.*'

| | | | |
|---|---|---|---|
| **School District:** Augusta County Public Schools | | **Year:** 2017 | **Quarter:** 2 |
| **File Name:** SMM_SDVA_4979087_2_2017_07.XFR | | **Status:** Uploaded | |

Matching Status: Duplicates ▼  Last Reviewed By: ▼  First Name: [____]
RID: [____]  Last Name: [____]  Zip: [____]
Date Of Birth: [__] ▼  Gender: ▼
Student ID: [____]

[ Review Complete ] [ Save ] [ Reset ] [ Close ]  [ Next Page ]

| Match | Non-match | Review Needed | RID | Last Name ▲ | First Name | Middle Name | DOB | Gender | Address Line 1 | Address Line 2 | City | State | Zip | Source | Last Reviewed |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | ☐ | | Apple | Jessica | | 06/13/2000 | F | 44 SPRING CREST LN #100 | | ANYTOWN | VA | 24401 | SD | |
| ☐ | ☐ | | 123456789876 | Apple | Jessica | | 07/13/2000 | F | 44 SPRING CREST LANE APT 100 | | Anytown | VA | 244015653 | DMAS | Chcf, Admin |
| | | ☐ | | Apple | Jessica | | 07/13/2001 | F | 100 MAIN STREET | | ANYTOWN | VA | 24401 | SD | |
| ☐ | ☐ | | 123456789876 | Apple | Jessica | | 07/13/2000 | F | 44 SPRING CREST LANE APT 100 | | Anytown | VA | 244015653 | DMAS | Chcf, Admin |

[ Review Complete ] [ Save ] [ Reset ] [ Close ]  [ Next Page ]

**Step 3:** Review **all pages** of duplicates before moving on to review Possible Matches. Navigate to the next set of duplicates (multiples) by clicking on the "*Next Page*" button.

## Reviewing Possible Matches

All possible/close matches are reviewed interactively in the online system. By clicking the '*Uploaded*' link in the status column, you will be able to determine if the student is a '*Match*' or '*Non-Match*' to the closely matched DMAS recipient. Alternatively, the record may be moved to '*Review Needed*' for further review and follow-up.

**Step 1:** Select the Matching Status of "*Possible Match*" from the drop-down and click '*Search*.'



The students are shown in color highlighted pairs (or multiples) to allow for easy comparison of the school division information to the DMAS eligibility information. The student's information highlighted in red is from the DMAS file.

**Step 2:** Review each possible match pair (or multiples) and decide whether to manually '*Match*', '*Non-Match*' or mark for '*Review Needed*' by clicking the appropriate box in the left hand columns.

**Step 3:** At any time, you can save your work by clicking on the "*Save*" button at the top or the bottom of the list of student records.
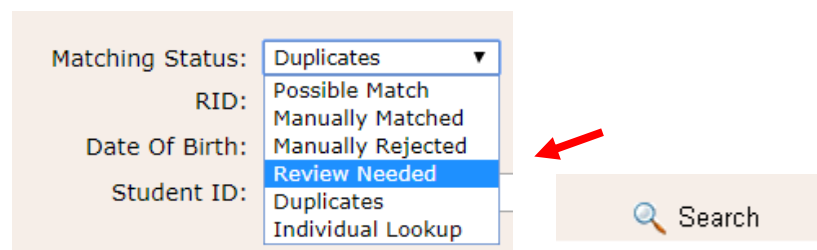


Clicking "*Save*" will process all of the records which were indicated as '*Match,*' '*Non-Match*' or '*Review Needed.*'

## Assigning Records to "Review Needed"

The system allows the reviewer to set aside records, or a group of multiple records, for further review at a later time. This allows the reviewer to set aside or move the records out of the 'Possible Match' status and continue working through the remaining possible matches where decisions can be made quickly and efficiently.

**Step 1:** To access the records that have previously been indicated as '*Review Needed,*' select the Matching Status of "*Review Needed*" from the drop-down and click '*Search.*'



**Step 2:** Indicate whether the records are a '*Match*' or '*Non-Match'* in the same method as previously described.

## Review Complete

After all records have been reviewed and a matching determination has been made for any possible matches, the file must be marked as complete by clicking on the "*Review Complete*" button from the Review Screen. The button is located either above or below the list of records:



This completes the matching process. You are now ready to review your results.

**Final Matching Reports:**

After all possible matches have been reviewed; the system will sort the students into the following 8 categories:

**Auto Matched:** These students were an exact match to a recipient in the DMAS eligibility file.

**Manually Matched:** These students were manually matched to a recipient in the DMAS eligibility file.

**History Matched:** These students exactly matched a pair of records (School Division record and DMAS eligibility file record) that was previously manually matched.

**Possible Matched:** These students are close matches to one or more students in the DMAS eligibility file. Further review is required by school division personnel. *Note: Any students remaining in this status at the time that the file is marked as 'Review Completed' will be counted as a Non Match for the purpose of calculating the Medicaid Eligibility Percentage.*

**Review Needed:** These students were not manually matched or manually rejected. The school division reviewer assigned these records for further review. *Note: Any students remaining in this status at the time that the file is marked as 'Review Completed' will be counted as a Non Match for the purpose of calculating the Medicaid Eligibility Percentage.*

**Auto Rejected:** These students were not matches or even possible matches to any recipient in the DMAS eligibility file.

**Manually Rejected:** These students were manually determined not to match any recipient in the DMAS eligibility file.

**History Rejected:** These students exactly matched a pair of records ((School Division record and DMAS eligibility file record) that was previously manually rejected.

To view or download and save your results, simply click on the Excel icon from the Review screen as shown below:



The report file will be downloaded as an Excel Workbook with 8 different tabs for each of the categories that resulted from the matching process, plus a Summary Report page.

**Troubleshooting Matching Issues:**

After reviewing the results of the match, what can I do if I identify students who were Auto-Rejected or History Rejected, but I believe they have active Medicaid coverage?

- Remember that the Medicaid eligibility file is just a snapshot in time of what the eligibility looked like as of the effective date of the file. Sometimes changes are made retroactively to enrollment information after the file is generated, so those changes won't be reflected in the file.

- Sometimes the student's name, date of birth and gender as uploaded by the school division are substantially different from the spelling of the student's name or the date of birth on record in the DMAS file. So sometimes these students will fail to match successfully because there are just too many discrepancies.

   - To address this issue, if you know the student's Medicaid ID#, try adding that information to the upload file and re-uploading.

## Summary Report:

The first (far left) tab on the downloaded Excel report is called "Summary Report." This report provides the summarized statistics that you will need to report in either a quarterly Administrative Activity Claim or in the annual Cost Report.

The Summary Report counts (summarizes or totals) the number of students in each of the matching categories. The detail tabs of the workbook (described above) provide the detailed list of students that fell into each category. These counts/totals are provided in the top section of the report appearing on rows 12 – 17:

| | A | B | C | D | E | F | G | H | I | J |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | School Based Medicaid Eligibility | | | | | | | | | |
| 2 | Summary Report | | | | | | | | | |
| 3 | Effective Date: | 12/01/2016 | | | | | | | | |
| 4 | Run Date: | 01/04/2017 | | | | | | | | |
| 5 | Run Time: | 11:26:05 AM | | | | | | | | |
| 6 | School District: | ABC County Public Schools | | | | | | | | |
| 7 | File Name: | SMM_SDVA_4979087_2_2017_02_20170104112603.XFR | | | | | | | | |
| 8 | Number of Records in ! | 10403 | | | | | | | | |
| 9 | File Status: | Finalized | | | | | | | | |
| 10 | | | | | | | | | | |
| 11 | | | | | | | | | | |
| 12 | | AUTO | MANUAL | HISTORY | POSSIBLE | REVIEW | AUTO | MANUALLY | HISTORY | Record |
| 13 | | MATCHED | MATCHED | MATCHED | MATCH | NEEDED | REJECTED | REJECTED | REJECTED | Count |
| 14 | Expansion | 575 | 1 | 21 | 0 | N/A | N/A | N/A | N/A | 597 |
| 15 | FAMIS | 336 | 3 | 12 | 0 | N/A | N/A | N/A | N/A | 351 |
| 16 | Medicaid | 2431 | 20 | 64 | 0 | N/A | N/A | N/A | N/A | 2515 |
| 17 | Total | 3342 | 24 | 97 | 0 | N/A | N/A | N/A | N/A | 3463 |
| 18 | | | | | | | | | | |

### AAC or Cost Report Statistics:

The Summary Report also provides the statistics to be reported in your quarterly Administrative Activity Claim or in your Cost Report. This information is shown at the bottom of the report on rows 20 – 34.

Administrative Claim Data section will always be shown on the report.

| | | |
|---|---|---|
| 19 | | |
| 20 | **Administrative Claim Data** | |
| 21 | | |
| 22 | Total Eligible Students | 3,112 |
| 23 | Total Students | 10403 |
| 24 | | |
| 25 | Medicaid Eligibility Rate | 29.91% |
| 26 | | |
| 27 | **Cost Report Data (Q2 Only)** | |
| 28 | | |
| 29 | Total Medicaid Students | 2,515 |
| 30 | Total Expansion Students | 597 |
| 31 | Total FAMIS Students | 351 |
| 32 | Total Students | 10403 |
| 33 | | |
| 34 | Medicaid Eligibility Rate | 33.29% |
| 35 | | |

*Note:* FAMIS students have already been excluded in the count provided for AAC.

Cost Report Data section will only be shown with Q2 matching files.
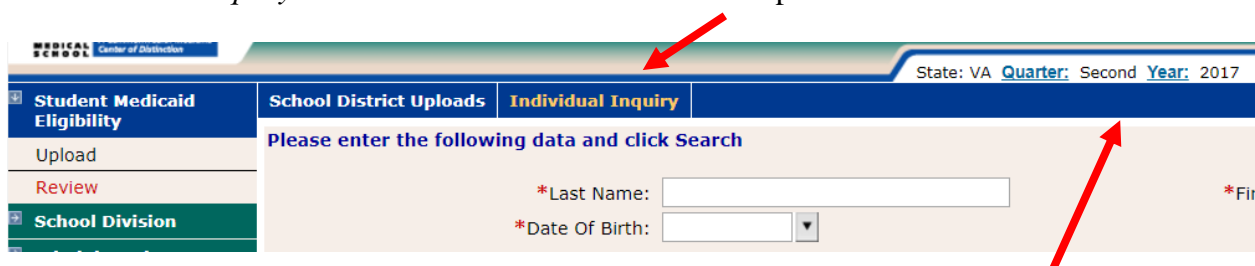
*Note:* The system does not know what the uploaded list of students represents. In other words, it doesn't know if the results of the match will be used in an Administrative Claim or in a Cost report. So for Quarter 1, 3 and 4 files, only Administrative Claim Data statistics will be shown on the report, but for Quarter 2 files, since the file could be either a Child Count file for the Cost

Report or a division-wide roster for the AAC claim, both statistics will be provided. Please use whichever statistics you need depending on what file you are matching.

**Individual Inquiry:**

The Individual Inquiry feature processes the matching request exactly like uploading a list of students in a file, except it does it immediately, with an on-screen response, for an individual student at a time.
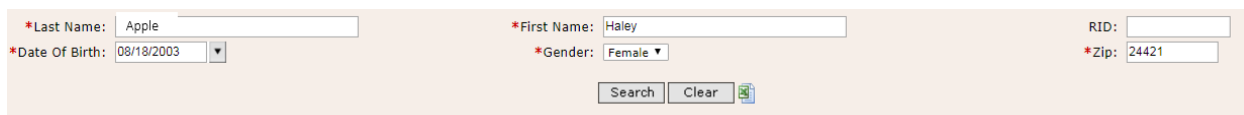
**Step 1:** Select "*Review*" from the left hand navigation menu, then select "*Individual Inquiry*" from the menu choices across the top of the screen.



**Step 2:** Navigate to the fiscal year and quarter that you need to match to by clicking on either "*Quarter*" or "*Year*" in the top right corner of the screen.

**Step 3:** Enter in the required fields of information about the student you wish to match. Required fields are indicated with a red asterisk. Then click "*Search*."
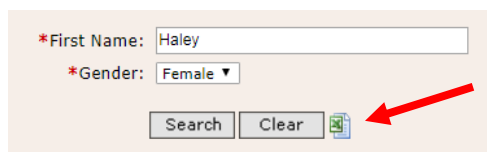


The system will respond with the matching status for the student information submitted. If a match is found, the matching DMAS information, including the student's Medicaid ID, will be displayed.

The results of an Individual Inquiry may be downloaded as an Excel report if you wish by clicking on the Excel icon on the middle of the screen, near the Search and Clear buttons.



**Step 3:** To inquire about another student, click on the "*Clear*" button to clear out the previous search and repeat the process.

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Appendix A:

# VA SCHOOL BASED MEDICAID PROGRAM

The purpose of this form is to identify the individuals designated by the school division to provide information necessary for the administration of the Cost Report and Student Eligibility Matching on behalf of the division.

**INSTRUCTIONS:**

1. Please provide a Student Eligibility Matching Uploader (1) who will be responsible for uploading the eligibility file, and Review Matching Designee(s) who can review and make match decisions on behalf of the division (may have more than one reviewer.)

2. Please list only one Cost Report Preparer.

| VA SCHOOL INFORMATION | |
|---|---|
| School Division: | |
| Form Prepared by: | |
| Date: | |

| STUDENT ELIGIBILITY MATCHING | |
|---|---|
| **Uploader** Name: _____ | Email: _____ |
| This person is also a Reviewer (Y/ N) : _____ **(same as above)** | |
| Reviewer Name: _____ | Email: _____ |
| Reviewer Name: _____ | Email: _____ |
| Reviewer Name: _____ | Email: _____ |

| COST REPORT PREPARER | |
|---|---|
| Name: _____ | Title: _____ |
| Email: | |

**Please submit completed forms to:**     **RMTSHelp@umassmed.edu**
or
FAX 1 (508) 856-7643

**University of Massachusetts Medical School**
**School-Based Medicaid Program**
**1-800-535-6741**
((REV 5-15)

Appendix B:

| Student Unique ID | RID | Last Name | First Name | Middle Name | Date of Birth | Gender | Address Line 1 | Address Line 2 | City | State | Zip code | SPED | Optional | Parental Consent |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 100 | 99929431265 | Sample | Student | | 1/19/2005 | M or F | 100 Anywhere Street | | Somewhere | VA | 01040 | Use Y or N | | Use Y or N |
| | (Medicaid ID) | | | | | | | | | | | | | |
| REQUIRED | | REQUIRED | REQUIRED | | REQUIRED | REQUIRED | REQUIRED | | REQUIRED | REQUIRED | REQUIRED | REQUIRED | | REQUIRED for BCR ONLY |

Row 1 - HEADER ROW - All header fields are REQUIRED and cannot be changed or deleted.

Row 2 - shows a sample of the data to put in the fields

Row 4 indicates REQUIRED fields (blank are optional but do not remove column)

Template/upload must be an Excel 97-2003 Workbook (.xls) or you will get an Error.

When you SAVE AS, re-name the file with the correct school number, Year and QTR you are uploading and save somewhere on your computer you can find it for uploading.

SMM_SDVA_223344_2_2017_01

223344 =SD number

Qtr = 2

FY = 2017

01 is the "number sequence"

Appendix C:

## Hints & Tips for Preparing a School Division upload file
## from the official December 1 Child Count File

For the annual Cost Report, the statistics to be reported must be based on your official, DOE Certified, December 1 Special Education Child Count. This file is also the key starting point when working on identifying the correct population of students that will be used to complete your Billing Compliance Review (BCR).

These instructions and tips are provided to assist school divisions with creating an Eligibility Matching Upload file by starting with the Certified Child Count file in its original format as prescribed by the Virginia Department of Education (DOE).

**Step 1:** Locate your official Certified Child Count file and save a copy of the file to work with. Let's call this file the "*Child Count Working File*."

**Step 2:** The Child Count file in DOE format contains many columns of data that are not needed for Medicaid eligibility matching. So in this step, identify the columns of data that **are** needed, and delete all the extra columns of data. The data elements/columns that you need to keep are:

> Students Last Name
> Students First Name
> Students Middle Name
> Unique Local Student Identifier
> Gender Code
> Birth Date

All other columns should be deleted. '*Save*' your file.

**Step 3:** Use the Unique Local Student Identifier field in the Child Count file to match the students to another data source which includes the address information and Medicaid ID numbers (if known) for these students.

*Option A*: Using the Local Student Identifier (Student ID#), match the child count list to a report generated from your Student Information Management system to pick up the address information for the students. You may want to ask your IT department for assistance with this.
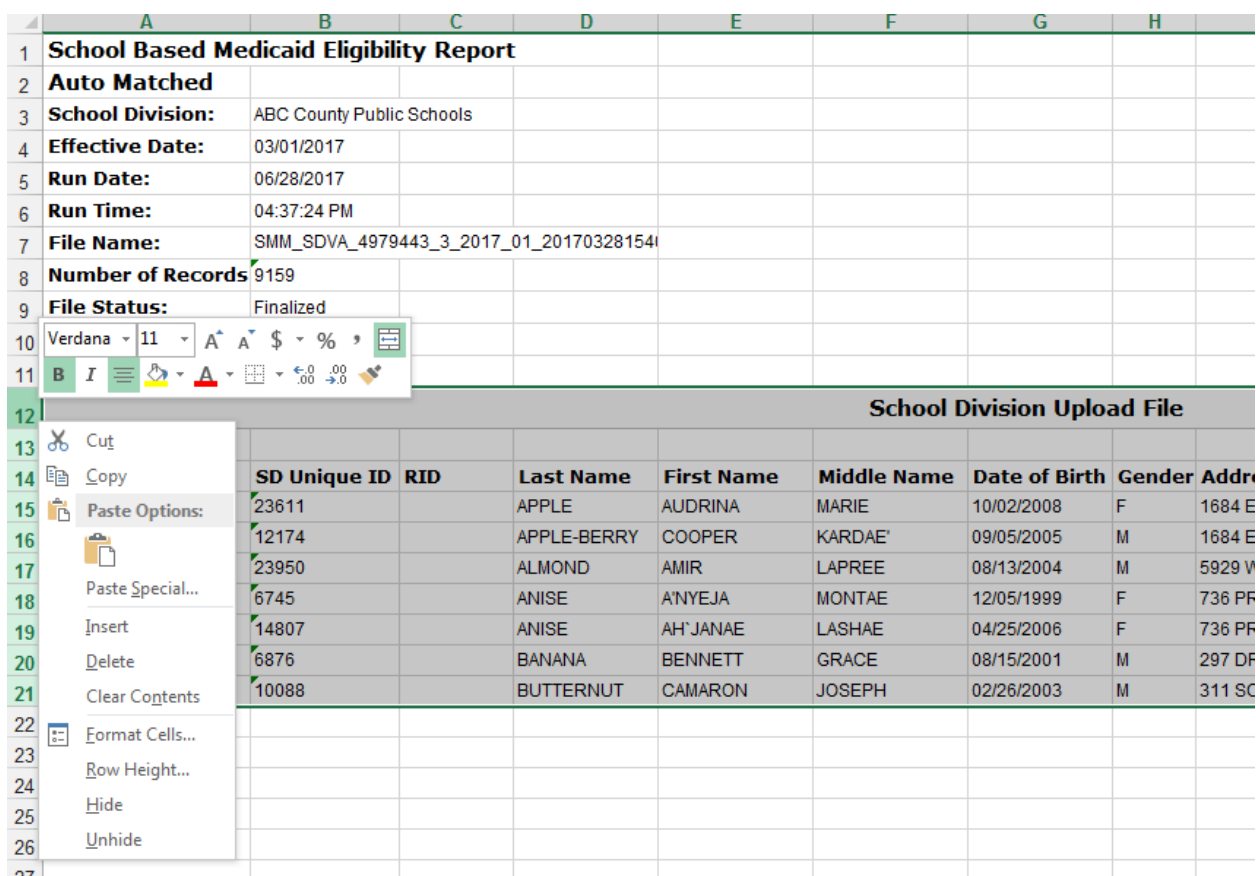
*Option B:* Using the Local Student Identifier (Student ID#), match the Child Count Working File to the division-wide eligibility file that you have previously used for completing the Quarter 2 AAC claim match. If you use your matching results file to complete this step, you can also pick up the Medicaid ID numbers for any eligible students at the same time.

*See next page for more information on Option B*

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**Start by creating a master list of students from an Eligibility Matching Results Workbook:**

**Step 1**:   Combine all the different tabs of the matching results workbook onto one tab of a brand new Excel workbook.

   a. Download your Quarter 2 division-wide eligibility matching results file from the system and save it to your computer.
   b. Create/Open a brand new blank Excel workbook.
   c. From the matching results file, start with the Auto Matched tab. ***Copy*** from row 12 (title row that says in gray bar 'School Division Upload File') down to the last row with a student listed on this tab. *(Tip: Highlighting the entire rows by Left Clicking on the row number. Start at row #12, then hold down the left mouse clicker as you highlight down the page. With all the rows still highlighted, lift your finger off the left clicker, then Right Click on your mouse to access the shortcut menu, and choose 'Copy')*



   d. Then ***Paste*** the data into your blank Excel workbook.
      • Click on the top left cell in the blank workbook – Cell A1
      • Right Click on your mouse to access the shortcut menu, and choose '*Paste*'

e. Your new Excel workbook page should look like this:



f. Save your new Excel workbook at this point so that you don't lose your work. Let's call your newly saved file the '*Master File*.'

g. Now repeat almost the same process with the Manually Matched students from your Eligibility Matching Results file. The only difference this time is that you don't need the row headings/titles for the rest of the tabs, so you should start copying at row 15.



h. This time when you paste into your new Master File, you will '*Paste*' starting on the row immediately below the last populated row from the prior step.



In this example, the last student that I copied in from the Auto-Matched tab is on row 10, so I will click on cell A-11, then Right Click and '*Paste*' my Manually Matched students.

i. Repeat this copy/paste process for the remaining tabs of the Eligibility Results file.

*Continued on the next page*

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**Step 2**:     In this step, you will clean up your Master File to get it down to just the information that you need.

   a. If you haven't done so recently, this is a good point to '*Save*' your Master File.
   b. Copy the Medicaid ID number from the DMAS Eligibility File section of the report to the School Division Upload File section of the report. In other words, copy Column Q into Column C.



Click on column letter Q to highlight the whole column. Then Right Click and '*Copy*,' then click on column letter C to highlight that whole column. Now Right Click and choose '*Paste*.'

   c. Now you're done with the DMAS Eligibility File part of your Master File so you can delete all those columns. Delete columns Q through AC.



Click on column letter Q and drag right through column AB to highlight all the columns to be deleted. Then Right Click and select '*Delete*.'

   d. Your Master File should now look like this:



| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | | | | | | | School Division Upload File | | | | | | | | | |
| 2 | | | | | | | | | | | | | | | | |
| 3 | | SD Unique ID | RID | Last Name | First Name | Middle Name | Date of Birth | Gender | Address Line 1 | Address Line 2 | City | State | Zip | SPED | Optional | |
| 4 | | 23611 | 999123456781 | APPLE | AUDRINA | MARIE | 10/02/2008 | F | 1684 EMERY RD | | ANYWHERE | VA | 12345 | N | | |
| 5 | | 12174 | 999123456782 | APPLE-BERRY | COOPER | KARDAE' | 09/05/2005 | M | 1684 EMERY RD | | ANYWHERE | VA | 12345 | N | | |
| 6 | | 23950 | 999123456783 | ALMOND | AMIR | LAPREE | 08/13/2004 | M | 5929 WHISPERING F | | ANYWHERE | VA | 12345 | N | | |
| 7 | | 6745 | 999123456784 | ANISE | A'NYEJA | MONTAE | 12/05/1999 | F | 736 PRITCHETT LN | | ANYWHERE | VA | 12345 | N | | |
| 8 | | 14807 | 999123456785 | ANISE | AH`JANAE | LASHAE | 04/25/2006 | F | 736 PRITCHETT LN | | ANYWHERE | VA | 12345 | N | | |
| 9 | | 6876 | 999123456786 | BANANA | BENNETT | GRACE | 08/15/2001 | M | 297 DR MEASE DR | | ANYWHERE | VA | 12345 | N | | |
| 10 | | 10088 | 999123456787 | BUTTERNUT | CAMARON | JOSEPH | 02/26/2003 | M | 311 SCHOOL RD | | ANYWHERE | VA | 12345 | N | | |

**Step 3**:     Now we have 2 files: The *Child Count Working File* and our *Master File*.

   a. The *Master File* should include all students enrolled in our school division as of December 1 of the fiscal year – everybody – not just Special Education students.

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b. The *Child Count Working File* should be a subset of the Master File because it should be a list of only the Special Education students across the division as of December 1 of the fiscal year.

In this step, we're going to match these 2 files to create a list of students in our December 1 Child Count which includes all the needed information for completing an eligibility match.

Starting with the *Master File*:

1. Delete Column A (which should be a blank column) and rows 1 and 2 which are unnecessary rows above the column headings.



After deleting, your file should look like this:



2. Copy your information from the *Child Count Working File* into the *Master File*.
   a. Starting with the *Child Count Working File*, highlight the 6 columns that have data, then '*Copy*'



   b. Then go to your *Master File*, click in cell P1, then '*Paste*'

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| | D | E | F | G | H | I | J | K | L | M | N | O | P | Q |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | First Name | Middle Name | Date of Birth | Gender | Address Line 1 | Address Line 2 | City | State | Zip | SPED | Optional | | | |
| 2 | AMIR | LAPREE | 08/13/2004 | M | 5929 WHISPERING F | | ANYWHERE | VA | 12345 | N | | | | |
| 3 | A'NYEJA | MONTAE | 12/05/1999 | F | 736 PRITCHETT LN | | ANYWHERE | VA | 12345 | N | | | | |
| 4 | AH'JANAE | LASHAE | 04/25/2006 | F | 736 PRITCHETT LN | | ANYWHERE | VA | 12345 | N | | | | |
| 5 | AUDRINA | MARIE | 10/02/2008 | F | 1684 EMERY RD | | ANYWHERE | VA | 12345 | N | | | | |
| 6 | COOPER | KARDAE' | 09/05/2005 | M | 1684 EMERY RD | | ANYWHERE | VA | 12345 | N | | | | |
| 7 | BENNETT | GRACE | 08/15/2001 | M | 297 DR MEASE DR | | ANYWHERE | VA | 12345 | N | | | | |
| 8 | BRENDA | LINDSEY | 08/13/2004 | M | 1985 HAPPY PLACE | | ANYWHERE | VA | 12345 | N | | | | |
| 9 | CAMARON | JOSEPH | 02/26/2003 | M | 311 SCHOOL RD | | ANYWHERE | VA | 12345 | N | | | | |
| 10 | CARLA | | 04/25/2006 | M | 200 JONES RD | | ANYWHERE | VA | 12345 | N | | | | |
| 11 | CHARLES | JAMES | 12/05/1999 | M | 500 PALACE PKWY | | ANYWHERE | VA | 12345 | N | | | | |
| 12 | CINDY | ANNE | 08/13/2004 | M | 101 MAIN ST | | ANYWHERE | VA | 12345 | N | | | | |
| 13 | SALLY | JANE | 12/05/1999 | M | 675 GATEWAY RD | | ANYWHERE | VA | 12345 | N | | | | |

Click in cell P1, then right click and '*Paste*'

After copying the Child Count data into your *Master File*, the *Master File* should look like this:

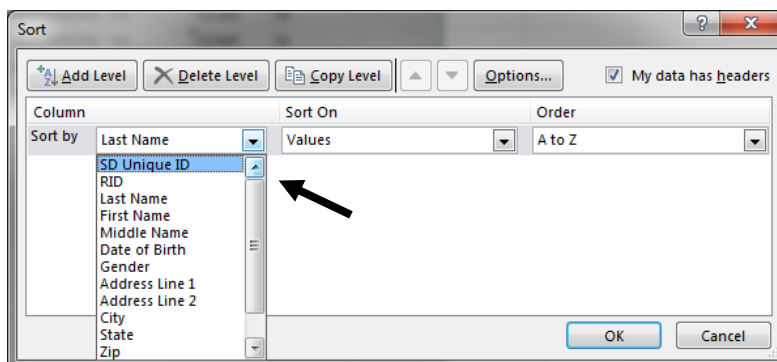| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | SD Unique ID | RID | Last Name | First Name | Middle Name | Date of Birth | Gender | Address Line 1 | Address Line 2 | City | State | Zip | SPED | Optional | | Last Name | First | Middle | Local | Code | Birth date |
| 2 | 23950 | 999123456783 | ALMOND | AMIR | LAPREE | 08/13/2004 | M | 5929 WHISPERING F | | ANYWHERE | VA | 12345 | N | | | Apple | Audrina | M | 23611 | F | 10/2/2008 |
| 3 | 6745 | 999123456784 | ANISE | A'NYEJA | MONTAE | 12/05/1999 | F | 736 PRITCHETT LN | | ANYWHERE | VA | 12345 | N | | | Apple-Berry | Cooper | K | 12174 | M | 9/5/2005 |
| 4 | 14807 | 999123456785 | ANISE | AH'JANAE | LASHAE | 04/25/2006 | F | 736 PRITCHETT LN | | ANYWHERE | VA | 12345 | N | | | Almond | Amir | L | 23950 | M | 8/13/2004 |
| 5 | 23611 | 999123456781 | APPLE | AUDRINA | MARIE | 10/02/2008 | F | 1684 EMERY RD | | ANYWHERE | VA | 12345 | N | | | Anise | A'nyeja | M | 6745 | F | 12/5/1999 |
| 6 | 12174 | 999123456782 | APPLE-BERRY | COOPER | KARDAE' | 09/05/2005 | M | 1684 EMERY RD | | ANYWHERE | VA | 12345 | N | | | Anise | Ah'Janae | L | 14807 | F | 4/25/2006 |
| 7 | 6876 | 999123456786 | BANANA | BENNETT | GRACE | 08/15/2001 | M | 297 DR MEASE DR | | ANYWHERE | VA | 12345 | N | | | Banana | Bennett | G | 6876 | M | 8/15/2001 |
| 8 | 1010 | 999123456791 | BLUEBERRY | BRENDA | LINDSEY | 08/13/2004 | M | 1985 HAPPY PLACE | | ANYWHERE | VA | 12345 | N | | | Butternut | Camaron | J | 10088 | M | 2/26/2003 |
| 9 | 10088 | 999123456787 | BUTTERNUT | CAMARON | JOSEPH | 02/26/2003 | M | 311 SCHOOL RD | | ANYWHERE | VA | 12345 | N | | | | | | | | |
| 10 | 10099 | 999123456790 | CARROT | CARLA | | 04/25/2006 | M | 200 JONES RD | | ANYWHERE | VA | 12345 | N | | | | | | | | |

3. In this step, you will match up the 2 lists of students that are now combined onto one page of your *Master File*.
   a. Sort both lists in order by the Student ID #
      i. Sort the list on the left by highlighting columns A through N, then from the menu across the top of the page, choose '*Data*', then '*Sort*'

| FILE | HOME | INSERT | PAGE LAYOUT | FORMULAS | DATA | REVIEW | VIEW | OFFCAT |
|---|---|---|---|---|---|---|---|---|

From Access | From Web | From Text | From Other Sources | Existing Connections | Refresh All | Connections | Properties | Edit Links | Sort | Filter | Clear | Reapply | Advanced | Text to Columns | Flash Fill | Remove Duplicates | Data Validation | Consolidate | What-If Analysis | Relationships | Group | Ungroup | Subtotal | Show De... | Hide De...

Get External Data | Connections | Sort & Filter | Data Tools | Outline

A1 | SD Unique ID

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | SD Unique ID | RID | Last Name | First Name | Middle Name | Date of Birth | Gender | Address Line 1 | Address Line 2 | City | State | Zip | SPED | Optional | |
| 2 | 23950 | 999123456783 | ALMOND | AMIR | LAPREE | 08/13/2004 | M | 5929 WHISPERING F | | ANYWHERE | VA | 12345 | N | | |
| 3 | 6745 | 999123456784 | ANISE | A'NYEJA | MONTAE | 12/05/1999 | F | 736 PRITCHETT LN | | ANYWHERE | VA | 12345 | N | | |
| 4 | 14807 | 999123456785 | ANISE | AH'JANAE | LASHAE | 04/25/2006 | F | 736 PRITCHETT LN | | ANYWHERE | VA | 12345 | N | | |
| 5 | 23611 | 999123456781 | APPLE | AUDRINA | MARIE | 10/02/2008 | F | 1684 EMERY RD | | ANYWHERE | VA | 12345 | N | | |
| 6 | 12174 | 999123456782 | APPLE-BERRY | COOPER | KARDAE' | 09/05/2005 | M | 1684 EMERY RD | | ANYWHERE | VA | 12345 | N | | |

      ii. In the dialogue pop-up window, make sure that 'My data has headers' is checked, and then choose to *Sort by* 'SD Unique ID' from the drop down, then click '*Okay*.'

**Sort**

Add Level | Delete Level | Copy Level | ☑ My data has headers

| Column | Sort On | Order |
|---|---|---|
| Sort by | Last Name | Values | A to Z |

SD Unique ID
RID
Last Name
First Name
Middle Name
Date of Birth
Gender
Address Line 1
Address Line 2
City
State
Zip

OK | Cancel

iii. Repeat the same procedure to sort the list on the right by highlighting all of columns P through U, then choose '*Data*' and '*Sort*'



iv. This time you'll sort by 'Unique Local Student Identifier' which should also be your Student ID #
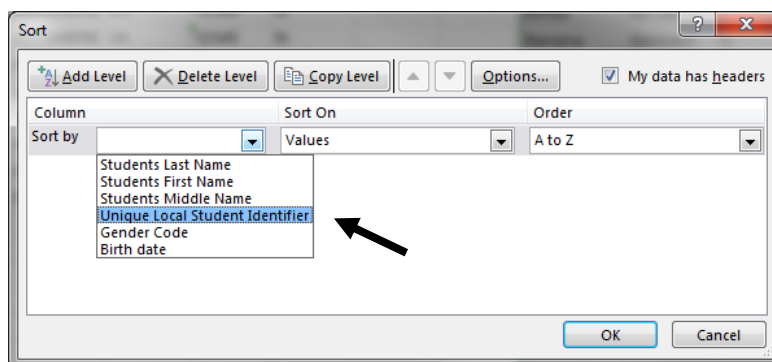


b. Match the lists using a formula that will match on the Student ID#
   i. Add a column title to Column O called "*Missing?*"
   ii. In Cell O2 enter this formula *(Note: in the example, the student ID# is in column A and S)*:

   =ISNA(MATCH(A2,S:S,FALSE))

   iii. Copy the formula down to the bottom of the list of students

iv. *Copy* and *Paste Special Values* on the "Missing?" Column O
   1. Highlight all of Column O, then *Right Click* and select '*Copy*'
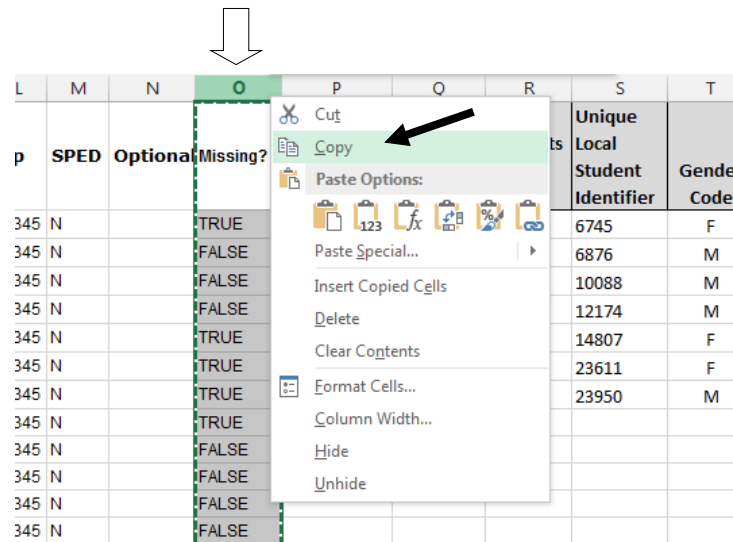


2. Then, with Column O still highlighted, *Right Click* again and select *Paste Options: Values* as shown (choose the '123' icon:)
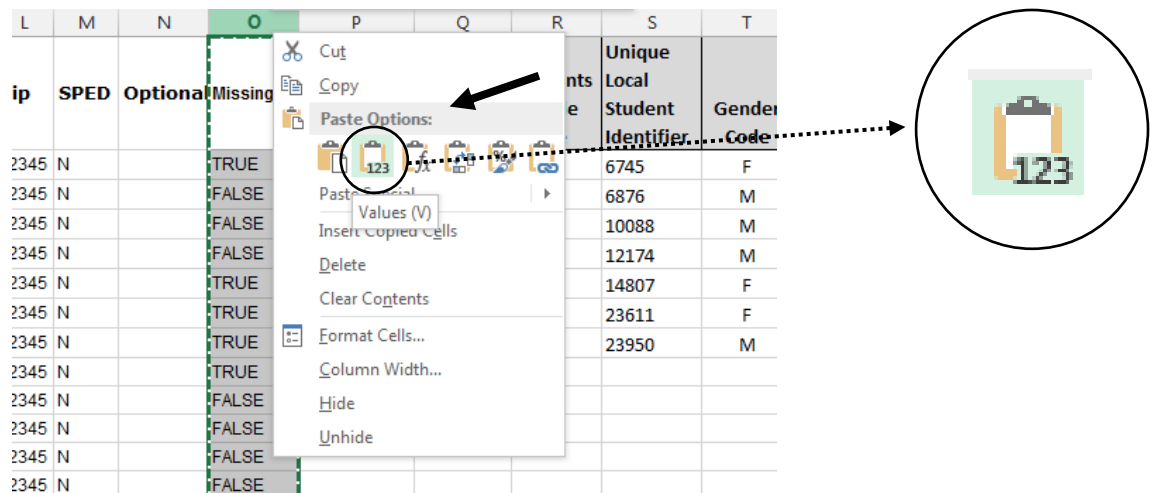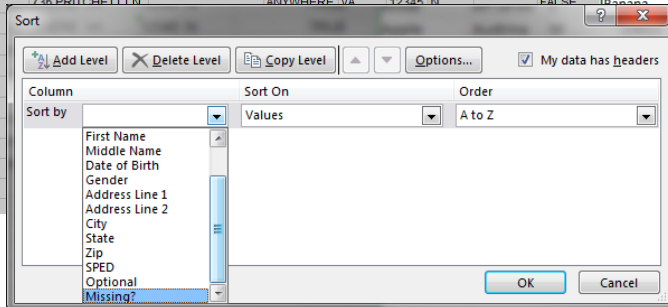


v. Sort columns A through O by the *Missing?* Column
   1. Highlight all columns A – O
   2. From the '*Data*' menu, select '*Sort*'
   3. Sort by '*Missing?*'

vi. Excel will sort the 'False' response to the Missing? question to the top of the page. This should line up the records on the left from your Master File with the information on the right, from your Child Count.

1. To confirm, add an 'if' statement to check

   a. Insert a new Column between columns O and P by clicking on column P to highlight the whole column, then *Right Click* and choose '*Insert*'



   b. Add a title to the new column, called '*Match?*'
   c. In Cell P2 enter this formula (Note: in the example, the student ID# is in column A and T):

   =IF(A2=T2,"ok","ERR")

   d. Copy the formula down to the last '*False*' in the 'Missing?' column in the list of students

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| | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Last Name | First Name | Middle Name | Date of Birth | Gender | Address Line 1 | Address Line 2 | City | State | Zip | SPED | Optional | Missing? | Match? | Students Last Name | Student First Name |
| | ANISE | A'NYEJA | MONTAE | 12/05/1999 | F | 736 PRITCHETT LN | | ANYWHERE | VA | 12345 | N | | FALSE | ok | Anise | A'nyeja |
| | BANANA | BENNETT | GRACE | 08/15/2001 | M | 297 DR MEASE DR | | ANYWHERE | VA | 12345 | N | | FALSE | ok | Banana | Bennett |
| | BUTTERNUT | CAMARON | JOSEPH | 02/26/2003 | M | 311 SCHOOL RD | | ANYWHERE | VA | 12345 | N | | FALSE | ok | Butternut | Camaron |
| | APPLE-BERRY | COOPER | KARDAE' | 09/05/2005 | M | 1684 EMERY RD | | ANYWHERE | VA | 12345 | N | | FALSE | ok | Apple-Berry | Cooper |
| | ANISE | AH'JANAE | LASHAE | 04/25/2006 | F | 736 PRITCHETT LN | | ANYWHERE | VA | 12345 | N | | FALSE | ok | Anise | Ah'Janae |
| | APPLE | AUDRINA | MARIE | 10/02/2008 | F | 1684 EMERY RD | | ANYWHERE | VA | 12345 | N | | FALSE | ok | Apple | Audrina |
| | ALMOND | AMIR | LAPREE | 08/13/2004 | M | 5929 WHISPERING F | | ANYWHERE | VA | 12345 | N | | FALSE | ok | Almond | Amir |
| | BLUEBERRY | BRENDA | LINDSEY | 08/13/2004 | M | 1985 HAPPY PLACE | | ANYWHERE | VA | 12345 | N | | TRUE | | | |
| | LETTUCE | CINDY | ANNE | 08/13/2004 | M | 101 MAIN ST | | ANYWHERE | VA | 12345 | N | | TRUE | | | |
| | SPINACH | SALLY | JANE | 12/05/1999 | M | 675 GATEWAY RD | | ANYWHERE | VA | 12345 | N | | TRUE | | | |
| | CARROT | CARLA | | 04/25/2006 | M | 200 JONES RD | | ANYWHERE | VA | 12345 | N | | TRUE | | | |

Formula bar: `=IF(A2=T2,"ok","ERR")`

     e.  If you have all 'ok' responses, then you're good!

4.  Clean up your file to create an Eligibility Matching upload file
    a.  Delete all extra rows of students who aren't matched to your Child Count
    b.  Delete the extra columns to the right where your Child Count information was
    c.  Copy and paste into an Eligibility Matching Upload template and you're ready to upload a matching file with your Certified December 1 Child Count roster!

Good job!